



healthcare financial management association

MAKING THE MOST OF PEER REVIEW

CLIENT TOOLKIT

PEER
REVIEWED
— by HFMA —

®

*HFMA staff and volunteers determined that these healthcare business solutions have met specific criteria developed under the HFMA Peer Review process.
HFMA does not endorse or guarantee the use of these healthcare business solutions or that any results will be obtained.

CONGRATULATIONS ON YOUR PEER REVIEW DESIGNATION!



The Peer Reviewed label tells healthcare finance professionals that your product or service has earned a “superior” rating in HFMA’s rigorous review process. We want to help you make the most of the marketing opportunities that come with your designation. This toolkit offers resources to get you started.

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HOW HFMA PROMOTES PEER REVIEW

THE SHORT LIST (online): Posted on the HFMA website hfma.org/peerreview, THE SHORT LIST features Peer Reviewed products, services, and ROI calculators in searchable format.

THE SHORT LIST: Peer Review clients who are listed in the *Buyer's Resource Guide* will have the Peer Review logo next to their listing distinguishing them in the guide. Learn more about the *Buyer's Resource Guide* at hfma.org/brg.

hfm: HFMA highlights all Peer Reviewed products, services, and ROI calculators in *hfm* magazine ([see page 5](#)), including your company logo and web address.

Announcement release: HFMA announces new Peer Reviewed products, services, and ROI calculators in a media release hfma.org/PRmedia. Email a quote from a company executive commenting on earning the designation, boilerplate company description, and contact name for the release to abecker@hfma.org.

Other promotions: Peer Review is promoted in HFMA specialty publications, e-newsletters, and at HFMA and industry events.

Social media: We advertise Peer Review on HFMA's Twitter feed, Facebook page, and LinkedIn – all driving traffic to Peer Reviewed listings on the HFMA website.

Online Advertising: We advertise Peer Review through Google and LinkedIn, driving traffic to Peer Reviewed listings on the HFMA website.

* Specific marketing efforts are subject to change.

Peer Review Toolkit

PROMOTION IN *hfm*

THE SHORT LIST

HFMA Peer Reviewed products and services have been evaluated by users like you for quality, technical support, customer service, and value—all the things you look for to make smart purchasing decisions.

SERVICES

 AMN[®] Healthcare	Managed Services Provider (MSP) - Workforce Solutions www.healthcare.com
 BESLER	Transfer DRG Revenue Recovery Service digitandler.com
 ENSEMBLE HEALTH PARTNERS	Full Revenue Cycle Services including Facility Patient Access Services, Pre-Arrival Services, Health Information Management, Integrity Services and Central Business Office Services ensemblehp.com
 FIRST AMERICAN FINANCIAL SERVICES	Financing Solutions offered by First American Healthcare Finance fafi.com
 HELP Financial	Patient Financing Solutions helpfinancial.com
 MedData[®]	MedData Eligibility Services meddata.com
 PARALLON[®]	Revenue Cycle Outsourced Services parallon.com
 PAVILION	Investment Consulting, Advisory Services and Retirement Benefits pavilion-morrell.com
 Professional Credit	Professional Credit Healthcare Collection Service professionalcredit.com
 pfc_rev	Healthcare Bad Debt Recovery by PFC Rev pfcrev.com

PRODUCTS

 athenahealth	athenaDX[™] athenahealth.com/athenaDX
 BESLER	Easy Work Papers besler.com/easyp
 CareCredit	CareCredit Credit Card by Synchrony Financial carecredit.com/hfma
 ChangeAssist	Change Assist by Hollister & Associates—including CDM Audit [™] , Price Adjustment, Cost Monitor [™] and Ultimate Research Center [™] changeassist.com
 Craneware	ChargeMaster Toolkit [™] craneware.com
 EPSi	EPS [™] Budget Manager, EPS [™] Cost Manager, EPS [™] Product Line Analytic epsii.com
 OPTUM 360[®]	Optum [®] LYNX ED Charging Application Optum360.com
 PANADEA	CDM4U.com Hospital Zero-Basis Pricing [™] panadea.com
 PATIENTCO	Patientco Billing and Payment Platform patientco.com
 PELTAS	iPAS [®] Integrated Patient Access Solutions peltas.com
 PMMC	PMMC ESTIMATOR PRO, PMMC CONTRACT PRO pmmcinc.com
 PREMIER	ERP premierinc.com/solutions/finance-operations
 TruBridge	TruBridge RCM Solution trubridge.com
 WAYSTAR	Patient Pay Optimization, Revenue Integrity, Clinical Management waystar.com
 ROI CALCULATOR	
 CLEARBalance	CLEARBalance [™] ROI Value Model (for ClearBalance [™] patient financing program) clearbalance.org

hfma | Peer Review

Learn More!

hfma.org/peerreview

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hfma
The Heartbeat of Progress
hfma.org



HFMA highlights all Peer Reviewed products and services in *hfm* magazine. Each listing includes client logo, the name(s) of the Peer Reviewed product(s)/service(s), and a company web address.

Belly bands highlighting your Peer Reviewed product wrap around *hfm* and are sent directly to members and subscribers.

Peer Review Toolkit

AT HFMA EVENTS

Our approach at Annual Conference has always been to put you in the spotlight. We highlight Peer Reviewed exhibiting companies by their booth in addition to on-site signage.

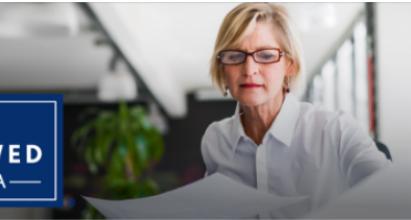


Peer Review Toolkit

ONLINE

Healthcare Financial Management Association (HFMA) ...
June 17 · 

You need **#healthcare** business solutions now. Look no further than the Peer Reviewed Short List, a trusted resource with products and services that have been extensively vetted by a panel of healthcare finance professionals, like yourself. Your due diligence is done when you turn to the Short List. <http://ow.ly/AiPM50A8uDa>

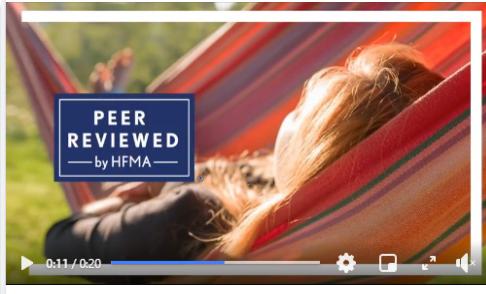


**PEER
REVIEWED**
—by HFMA—

**SEARCH
THE SHORT LIST.**

hfma | Peer Review

HFMA @hfmaorg · Aug 15
Peer Review from **#HFMA** showcases products evaluated by users like you. Access **THE SHORT LIST.**

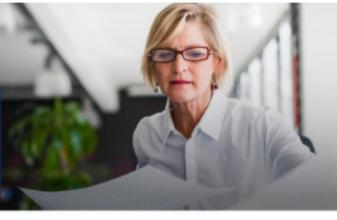


0:11 / 0:20

rim.ag

hfma 35,241 followers
4mo · 

You need **#healthcare** business solutions now. Look no further than the Peer Reviewed Short List, a trusted resource with products and services that have been extensively vetted by a panel of healthcare finance professionals, like you ...see more



**PEER
REVIEWED**
—by HFMA—

**SEARCH
THE SHORT LIST.**

hfma | Peer Review



Market your Peer Reviewed product, service, or ROI calculator on Twitter with **#TheShortList**



In addition to your product promotion with the Peer Review Logo, HFMA advertises Peer Review to more than 44,000 followers on social media, driving traffic to the Peer Reviewed SHORT LIST and your product listings.

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HOW YOU CAN SPREAD THE WORD



Use the Peer Reviewed logo: See page 15 for guidelines on how to use the logo in your packaging and marketing materials. **Note** that the following disclaimer must always be used with the logo: "HFMA staff and volunteers determined that these healthcare business solutions have met specific criteria developed under the HFMA Peer Review process. HFMA does not endorse or guarantee the use of these healthcare business solutions or that any results will be obtained."

Your Key Findings Report: HFMA has provided a version of your full Key Findings Report that you can share with potential clients in your marketing and sales efforts. With your permission, we have assisted in that effort by sharing the report with inquiring providers.

Inform your clients and prospects: See page 10 for a suggested letter announcing that you've achieved the coveted Peer Review status.

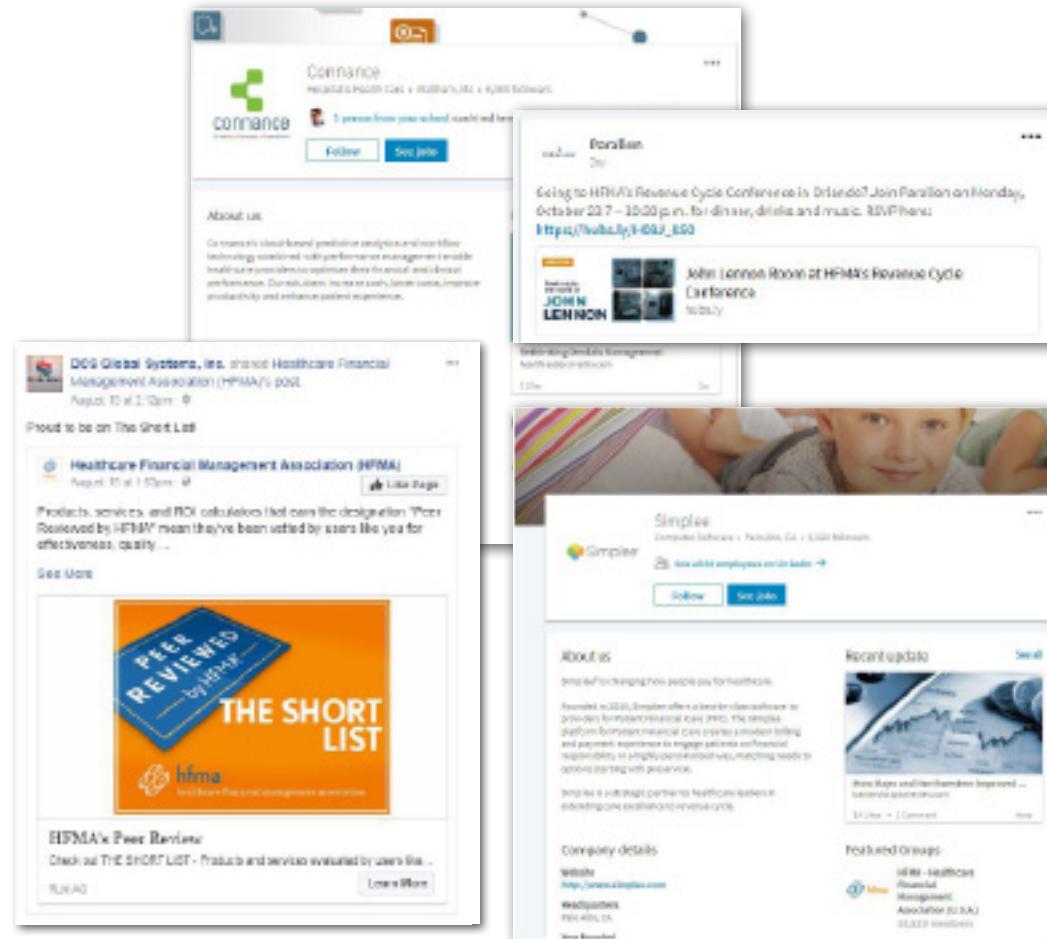
Share your Peer Reviewed designation: See page 11. Use the provided images to share your inclusion on HFMA's SHORT LIST with your followers.

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CONNECT THROUGH SOCIAL MEDIA

Share your Peer Reviewed status with social media followers. Download your social share kit

-  Market your Peer Reviewed product, service or ROI calculator on Facebook in your company's profile.
-  Market your Peer Reviewed product, service or ROI calculator on Twitter with **#TheShortList**.
-  Market your Peer Reviewed product, service or ROI calculator on LinkedIn in your company's overview and services sections.



Peer Review Toolkit

SAMPLE LETTER TO CLIENTS

COMPANY LOGO OR STATIONERY

PEER REVIEWED
by HFMA®

Dear **CUSTOMER**,

I am pleased to announce that **COMPANY NAME**'s **PRODUCT/SERVICE** has successfully passed the Healthcare Financial Management Association's (HFMA) Peer Review process. The Peer Reviewed designation is a respected and identifiable mark in the industry for HFMA's more than 56,000 members when they seek healthcare finance solutions.

The Peer Review process consists of a rigorous eleven-step high-level screening process by current customers, prospects, and expert HFMA Peer Review panel members. **PRODUCT/ SERVICE NAME** and its performance claims were reviewed based on the following criteria:

- Effectiveness
- Quality and usability
- Price
- Value
- Customer and technical support

Successfully passing the Peer Review process is a tremendous accomplishment. It recognizes the product excellence and high level of service **COMPANY NAME** continues to provide for its customers. We are honored that **PRODUCT/SERVICE** has achieved the Peer Review designation.

I would welcome the opportunity to discuss our **PRODUCT/SERVICE NAME** with you to reinforce how our commitment to price, service reliability, and overall high standards are reflected in the HFMA Peer Review designation.

Sincerely,
SALES MANAGER

For more about **PRODUCT/SERVICE NAME**, visit [URL.com](#)

For more about HFMA's Peer Review program, go to [hfma.org/peerreview](#)

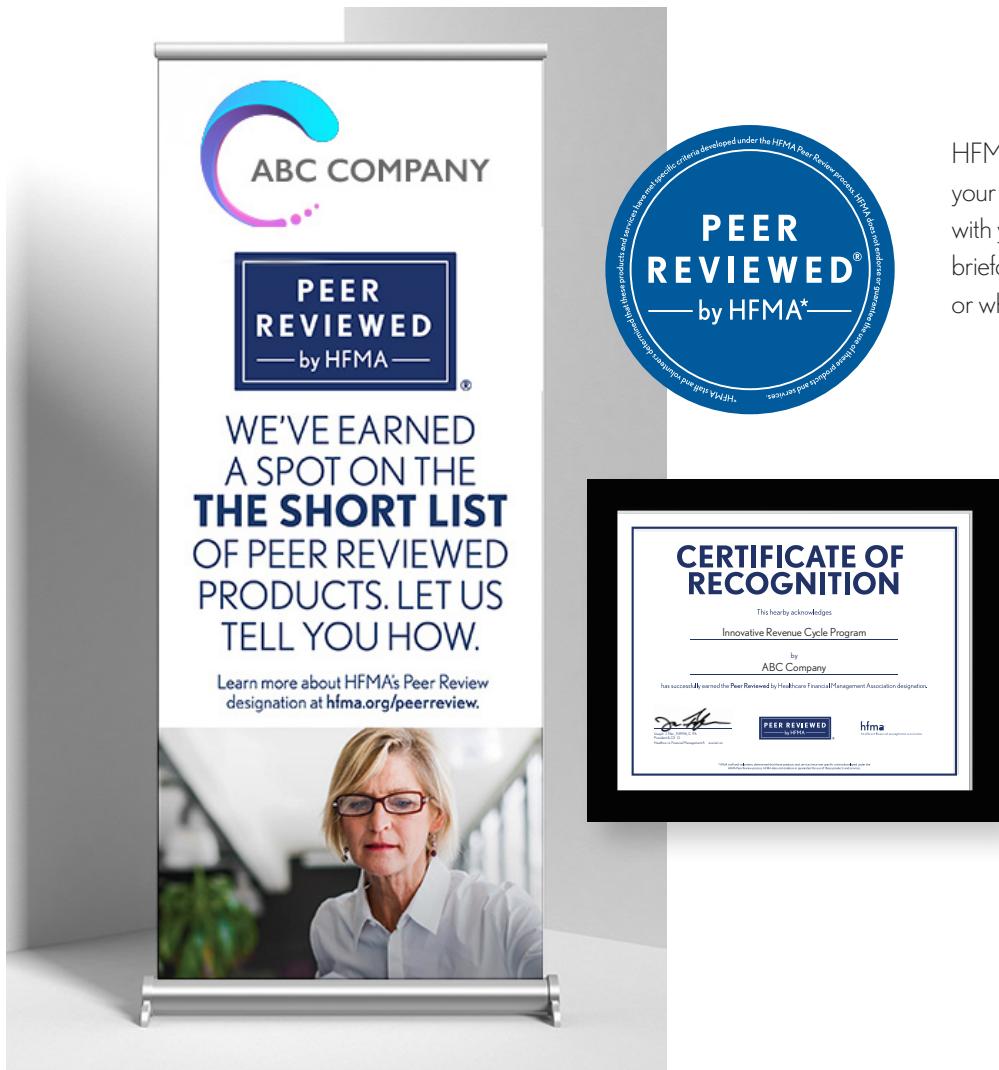
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Feel free to send this letter out to your clients or prospects via mail, email, and/or post it on your website and hyperlink to it from a marketing effort.

[Download this template](#) on the Peer Review client portal webpage.

Peer Review Toolkit

TOOLKIT ELEMENTS



HFMA will provide you with a tool kit to help you promote your Peer Review designation. Take the pop up banner with you to trade shows, use stickers on collateral or when briefcasing, and display the certificate in your office lobby or while exhibiting.

SPECIAL OPPORTUNITIES FOR TIER 2 PARTICIPANTS

Annual Conference Coaching Webinar

A coaching session providing you with tools and knowledge to put together the best possible RFP for a speaking session at Annual Conference. (A speaking slot is not guaranteed.)

Webinar

Present a timely and educational webinar with a provider partner. Webinar attendee list is provided for follow up and marketing. All presentations will be reviewed and approved by HFMA.

Chapter Education Resource Directory

Chapter leaders download Peer Review resources, speakers and topic areas, creating potential speaking engagements.

Presence in HFMA's chapter communications*

Materials are shared with all HFMA Chapters through a centralized platform.

Mind of the CFO

Participation in a one-hour conference call with a former healthcare CFO offers insight into purchasing decisions at the C-level and what influences those decision. In addition, your business solution is reviewed and discussed.

Expanded online Short List presence

Up to five additional links; links must be reviewed and approved by HFMA.

Additional Tier 2 Benefits for ROI Calculators

- Survey of 15-20 respondents
- Up to seven benchmark metrics from validated model
- External webinar including at least one customer- you will receive attendee list

CHECKLIST

PLEASE SEND THE FOLLOWING TO abecker@hfma.org:

- Logo** (.jpg and .eps formats)
- Link to web page** and optional video featuring your Peer Reviewed product, service, or ROI calculator. (Consider creating a vanity link with an easy-to-read URL for print pieces.)
- 75-word description** of your Peer Reviewed product, service, or ROI calculator.
 - Short summary of the 75-word description – using different language and terms for backend website metadata
 - Keywords about product, service, or ROI calculator that visitors may use when looking for your solution (ex: Revenue Cycle, Collections, Outsourcing, etc.)
- CEO contact information:** name, title, and address
(for the congratulatory letter from Joe Fifer, HFMA President and CEO)
- Quote + attribution**, boilerplate company description, and company contact name
(for our press release)
- Certificate of Insurance** (see Licensing Agreement sections 12.1-2).

TIER 2 PARTICIPANTS ONLY

- Chapter Education Resource Directory** listing information

Peer Review Toolkit

BRAND STANDARDS MANUAL

Peer Review Toolkit

BRAND STANDARDS

LOGO AND MESSAGING

Configurations

HFMA's Peer Reviewed logo has two configurations:

- Horizontal type
- Stacked type

Version 1—Horizontal Type



Version 2—Stacked Type



Version 3—10+ Years



The 10+ years logo is awarded to products and services that have held the Peer Review designation for 10 or more consecutive years. Usage guidance should mirror the guidance for the original Peer Review logo, outlined in this document.

Peer Reviewed Registered Trademark Symbol

The Peer Reviewed registered trademark symbol must be included on all logo versions and files just outside of the lower right hand corner. It must appear with the logo at all times.

Be sure to make any image box large enough to include the registered trademark symbol.

Peer Reviewed Logo Disclaimer

The asterisk in the logo refers to the following disclaimer which must always be used with the logo:

* HFMA staff and volunteers determined that these healthcare business solutions have met specific criteria developed under the HFMA Peer Review process. HFMA does not endorse or guarantee the use of these healthcare business solutions or that any results will be obtained.

The typeface for the disclaimer can be chosen by the client.

Messaging

Please note the correct usage of the following terms:

Peer Review:

Refers to the process.

- Peer Review logo
- Peer Review program
- Peer Review process
- Peer Review advertisements
- Peer Review status
- i.e. What is the Peer Review status?

Peer Reviewed:

Refers to the product.

- Peer Reviewed product or service
- Peer Reviewed designation
- Peer Reviewed status
- i.e. The product has achieved Peer Reviewed status.

These should be consistent in verbal and written form.

The Peer Review designation does not endorse a product or provide a product endorsement. The term "endorse" or "endorsement" should not be used when referring to the program or relation to your product/service/ROI calculator.

Peer Review Toolkit

BRAND STANDARDS



.75 inch minimum size



1.35 inches and larger: Use large version



.50 inch minimum size

PEER REVIEWED REGISTERED TRADEMARK SYMBOL

Do not re-size the web versions of the logo. If an alternate size is needed for the web, use the print files to create it.

Minimum Size

Logo must never be used smaller than sizes shown.

COLOR USAGE

Color

PMS 294 C
C 100, M 85, Y 30, K 22



White



Use these color options only.
Logo cannot appear in any other colors.

Peer Review Toolkit

BRAND STANDARDS

INCORRECT LOGO APPLICATION



Example 1:

Do not use the logo without the registered mark.



Example 2:

Do not change the color of the logo.



Example 3:

Do not remove the box or any elements from the logo, including box, bars, or wording.

Peer Review Toolkit

BRAND STANDARDS

ACCEPTABLE LOGO USAGE EXAMPLES

The Peer Review logo can be applied to product brochures, PowerPoint presentations, websites, and tradeshow signage referencing the product that has received the Peer Review designation.

The Peer Review designation is to be used in relation to products.



PRODUCT BROCHURE



PRODUCT WEB PAGE



EVENT SIGNAGE



POWERPOINT PRESENTATION

Peer Review Toolkit

BRAND STANDARDS



CORPORATE STATIONARY



BUSINESS CARD



EMAIL SIGNATURE

UNACCEPTABLE LOGO USAGE EXAMPLES

The Peer Review logo should not be applied to corporate stationary (that does not reference product with the Peer Review designation), business cards, email signatures or other uses implying HFMA has endorsed a company or individual.

The Peer Review designation is to be used in relation to products.

KEY CONTACTS

WE ARE HERE TO HELP!

Ashley Becker
Client Services Specialist
708.492.3351
abecker@hfma.org

Sandy Neuenkirchen
Peer Review Manager
708.492.3380
sneuenkirchen@hfma.org

Rita Walker
Director Channel Assets
708.492.3401
rwalker@hfma.org

FOR

- Program kick-off and introduction calls
- Press releases
- Questions for Peer Review status and benefits for Tier 1 and Tier 2
- Logo usage and guidelines approvals
- Questions about Peer Review sessions at HFMA's Annual Conference
- License agreement/Contract questions for term of contract
- Monthly program status calls
- Certificate of insurance questions
- Invoice questions

FOR

- Peer Review process related questions (after the application is submitted)
- Peer Review assessment
- Questions regarding a change in product/service/ROI calculator name or function

FOR

- Application requests and questions
- Peer Review benefits
- Process related questions (before the application is submitted)
- Contract/license agreement related questions
- License agreement fees/pricing
- Referral information
- Adding additional products/services /ROI calculators to existing agreements
- Renewal of the Peer Review program information